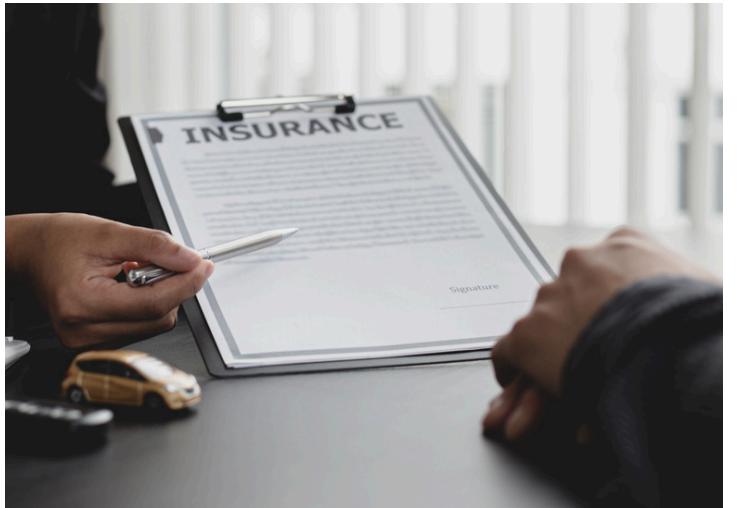




Shield Insurance Analysis

Agenda



- Company Overview
- Problem Statement
- Objective
- Dashboard
- Insights
- Recommendation



Introduction



Shield Insurance Company provides reliable and complete insurance plans for both people and businesses.

We focus on great customer service and strong protection, earning the trust of our clients over time.

Our goal is simple — to give you peace of mind with insurance you can count on



Problem Statement

Individuals and businesses often struggle to find reliable and comprehensive insurance that truly prioritizes their needs and peace of mind.

There is a growing demand for insurance providers who offer trustworthy coverage and exceptional customer service.

Shield Insurance Company aims to bridge this gap by delivering dependable, customer-focused insurance solutions tailored to offer security and confidence.

Objective

To analyze customer data and business performance metrics to uncover insights that help **Shield Insurance** improve policy offerings, enhance customer satisfaction, and drive data-informed decisions for growth and efficiency.



Dashboard Overview

Shield Insurance Analysis
Your Shield. Your Security

Overview

Sales View

Age View

Gain a clear view of overall performance with insights into monthly revenue trends, customer growth, and segmentation by age group and city

Explore how each sales mode performs in terms of revenue and customer acquisition, helping you pinpoint the most effective and profitable distribution channels

Dive into customer demographics to understand how different age groups contribute to revenue, estimated settlements, and preferred policy types — unlocking smarter targeting strategies.

SHIELD INSURANCE

Insights



-
- Revenue & Customer Insights by Age Group and City
 - Customers and Revenue Analysis on the basis of Sales Mode
 - Monthly Revenue Trend
 - Age Group Analysis
 - Age Group VS Policy Preference

Revenue & Customer Insights by Age Group and City

Revenue and Customer Split By Age Group

Age Group	Total Revenue	Total Customers
31-40	311.13M	10460
41-50	226.53M	6031
65+	203.92M	2235
51-65	165.62M	3077
25-30	56.74M	3194
18-24	25.32M	1844
Total	989.25M	26841

Revenue and Customer Split By City

City	Total Revenue	Total Customers
Delhi NCR	401.57M	11007
Mumbai	239.51M	6432
Hyderabad	160.52M	4340
Chennai	106.31M	2966
Indore	81.35M	2096
Total	989.25M	26841

Age Groups:

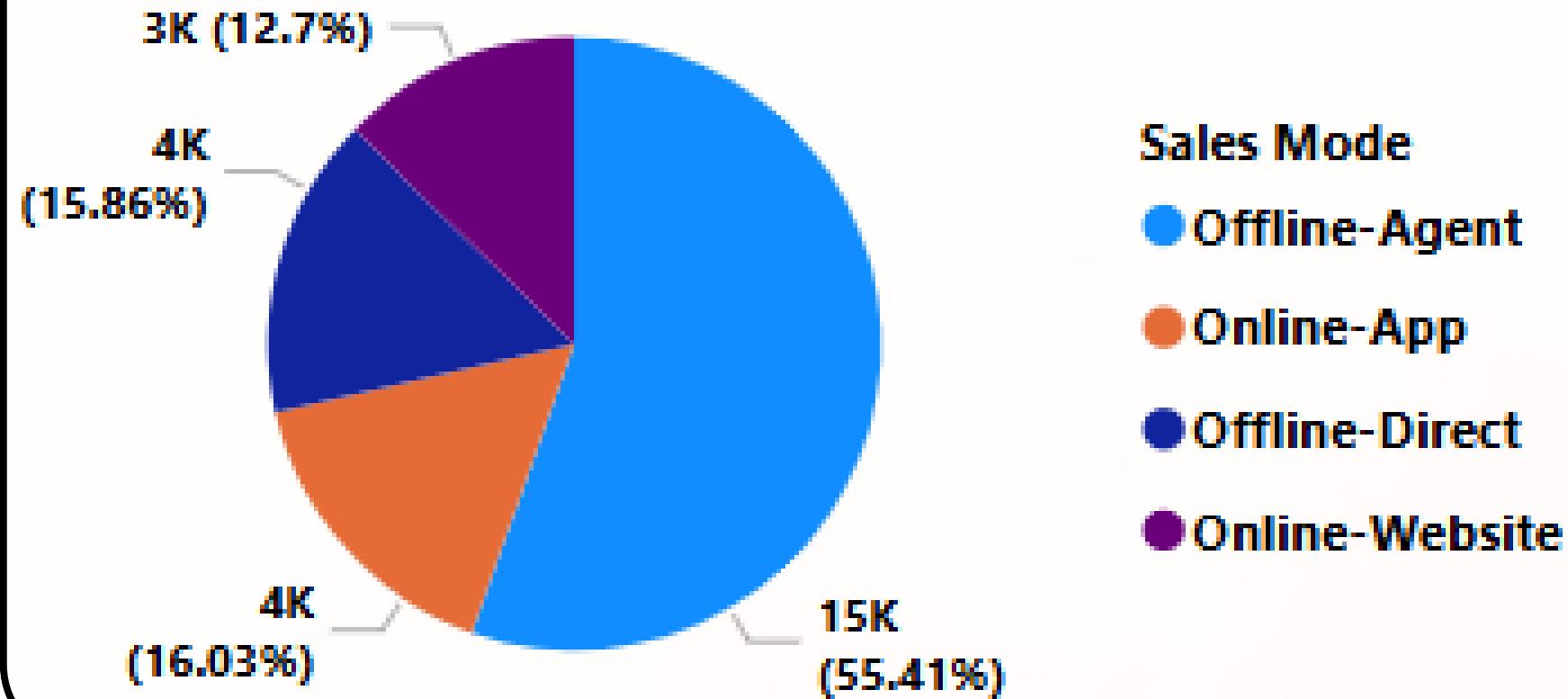
- Customers aged **31-40** bring in the highest revenue – ₹311M from 10,460 people.
- The **41-50** group follows with ₹226.5M from 6,031 customers.
- Customers aged **65** and above, though fewer in number, contribute a strong ₹203.9M, showing they are high-value customers.

Cities:

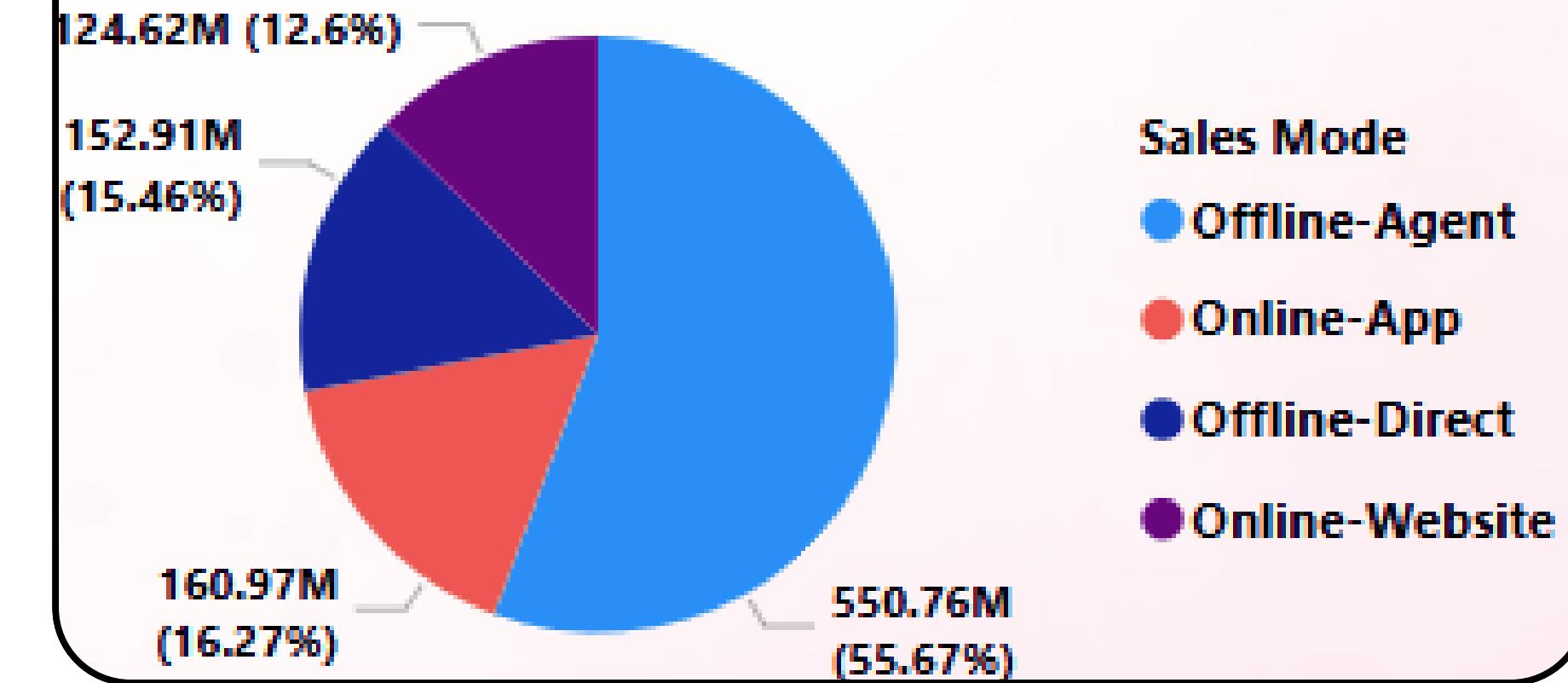
- Delhi NCR leads in revenue with ₹401.6M from 11,007 customers.
- Mumbai is next, generating ₹239.5M from 6,432 people.
- Hyderabad and Chennai also perform well.
- Indore brings in the least, with ₹81.3M from 2,096 customers.

Customers and Revenue Analysis on the basis of Sales Mode

Total Customers % Split by Sales Mode

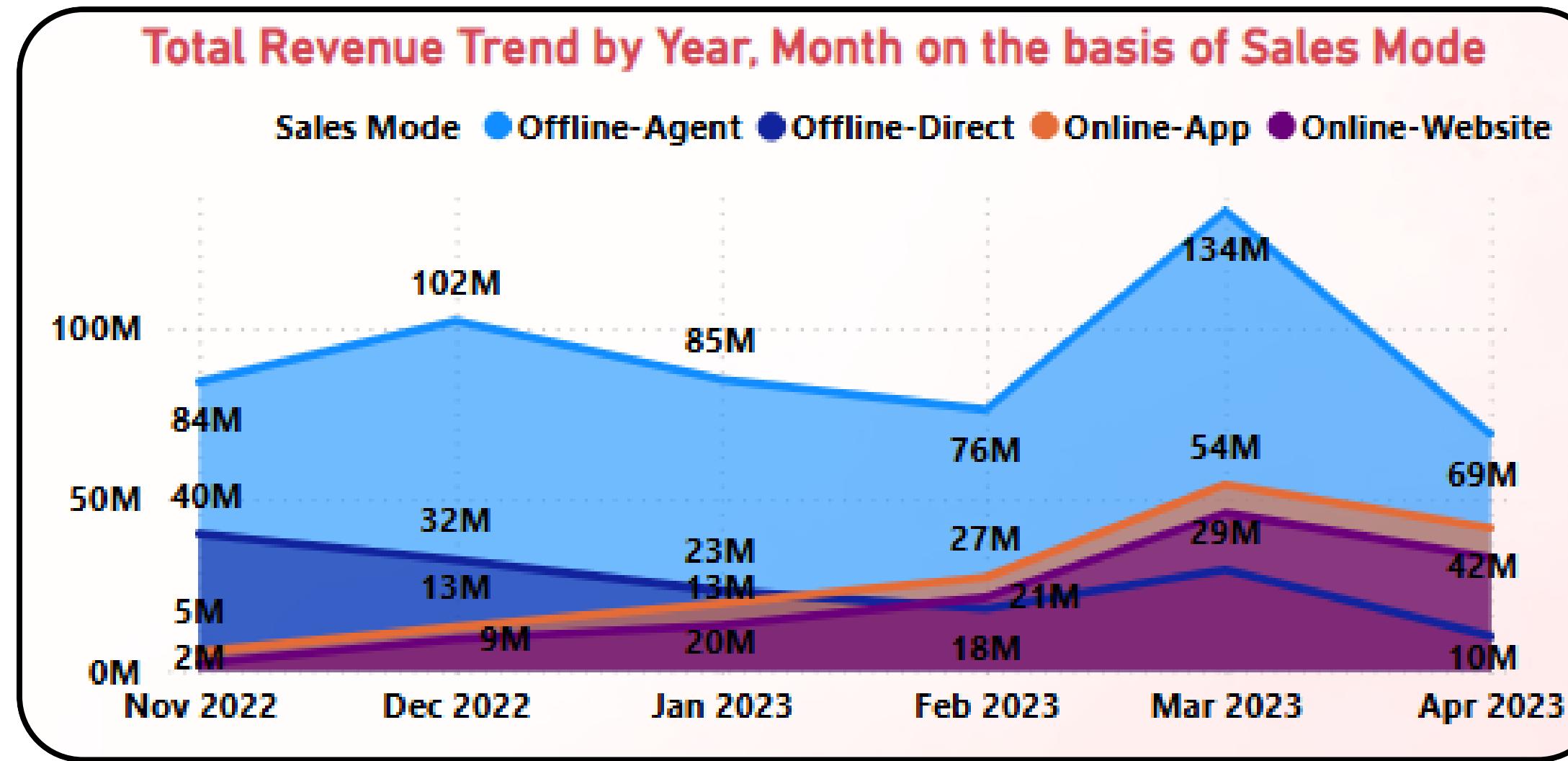


Total Revenue % Split by Sales Mode



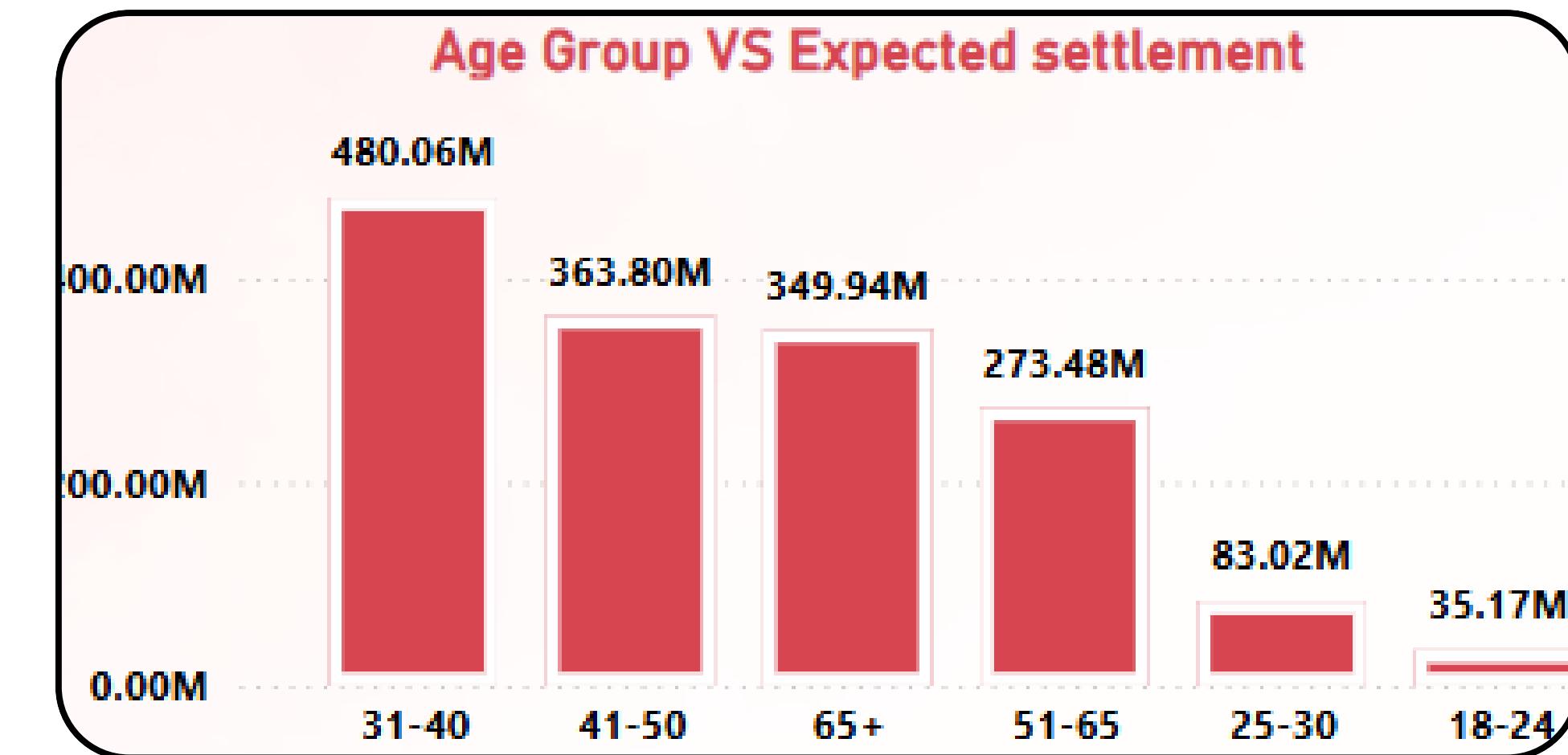
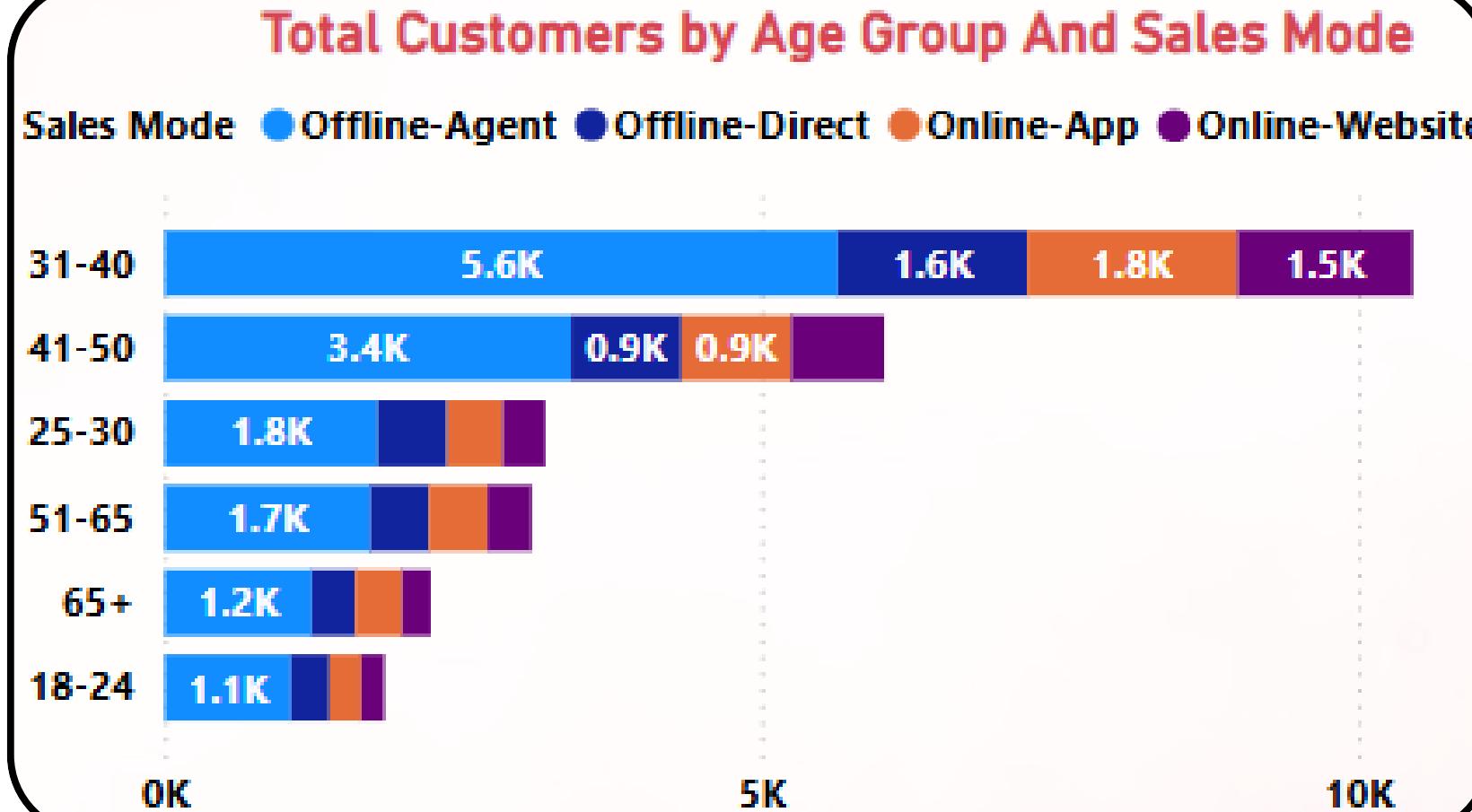
- Most of Shield Insurance's customers come through Offline Agents, making up **55.41%** of the total customer base.
- Other ways people buy insurance include the App (**16.03%**), Direct walk-ins or calls (**15.86%**), and the Website (**12.70%**).
- This shows that offline methods, especially Agents and Direct sales, are still very important.
- When it comes to revenue, **Agents** lead again, bringing in **55.67%** of the total.
- So, even though digital channels are growing, Offline Agents remain the top source for both customers and revenue.

Monthly Revenue Trend



- **Offline Agents** bring in the highest revenue overall, with a big jump in March 2023 reaching ₹134M.
- **Offline Direct sales** are dropping – from ₹40M in Nov 2022 down to ₹10M in April 2023.
- **Online sales (through App and Website)** are slowly growing and also hit their highest in March 2023 –
App: ₹54M
Website: ₹46M
- March 2023 was the best month for revenue across all sales channels.

Age Group Analysis



- The **31-40** age group has the most customers — about **10,500** with most of them (**5,600**) buying through **Offline Agents**.
- The **18-24** and **65+** age groups have the fewest customers, around **1,100-1,200** each.
- The **31-40** group also has the most insurance settlements — about **480.06M**.
- The **41-50** group is next, with around **363.80M** of total settlements.
- Most settlements happen in the **31-50** age range, while younger customers (**18-30**) have much fewer claims or settlements.

Age Group VS Policy Preference

Policy ID	Age Group VS Policy Preference						Total
	18-24	25-30	31-40	41-50	51-65	65+	
POL1048HEL	30	102	594	366	259	317	1668
POL2005HEL	32	81	499	373	365	618	1968
POL3309HEL	231	441	1836	858	318	145	3829
POL4321HEL	847	1152	1526	561	235	113	4434
POL4331HEL	379	630	1644	692	242	148	3735
POL5319HEL	93	269	1414	949	425	179	3329
POL6093HEL	74	185	966	724	369	225	2543
POL6303HEL	94	224	1202	897	421	179	3017
POL9221HEL	64	110	779	611	443	311	2318

- The **31-40** age group is the most active – they have the most customers, highest number of settlements, and buy the most policies.
- **POL3309HEL** and **POL4321HEL** are the most popular policies across many age groups.
- Older customers (**65+**) mostly prefer **POL2005HEL**.
- Younger customers (**18-24**) have fewer policy purchases, but when they do buy, they mostly choose **POL4331HEL** and **POL4321HEL**.

Recommendation

Grow Young & Senior Customer Base:

- Focus on attracting more 18–24 and 65+ customers to build long-term growth.

Keep 31–40 Group Engaged:

- This age group brings in the most revenue — offer personalized plans and loyalty programs to keep them coming back.

Expand in Other Cities:

- Use what worked in Delhi NCR to grow faster in cities like Mumbai and Chennai.

Boost Online Sales:

- Improve the App and Website to better connect with younger users, who prefer buying online.

Smart Policy & Risk Planning:

- Create special policies and stronger risk checks for high-claim age groups like 31–50 to reduce losses and improve service.





Thank You For Watching

